

YSM

YONGE STREET MISSION

THIRD PARTY EVENT TOOL KIT



Thank you for choosing to raise money in support of Yonge Street Mission (YSM). Your generosity will impact thousands of the community members we serve.

We want your fundraising event to be successful from start to finish, which is why this toolkit has been designed to help you through the event planning process.

While we hope you find it useful, please contact our Community Engagement & Fundraising Specialist, Eleanor Edwards at (416) 466-1865 or email events@ysm.ca if you have any further questions.

Thank You!



Toolkit Contents

How YSM will support your event	Pg #4
5 Steps to a successful event	Pg #5
All about tax receipting	Pg #7
Seeking event sponsorship	Pg #9
Making the most of social media	Pg #12
Email marketing tips	Pg #14
Maximizing media opportunities	Pg #16
Auction musts	Pg #17
Post-event considerations	Pg #20
Resources	Pg #21

How YSM will support your event



"I'm inspired by the amazing work YSM does and wanted a fun way to show my support . . ."

– (attribution)

- We will supply you with YSM logo(s) to use on your event materials, in alignment with YSM's branding guidelines, and will offer *pre-event approval* of your marketing / advertising materials featuring the YSM logo.
- An official letter of endorsement for your event.
- Use of our customizable peer-to-peer event software system, for use in collecting online pledges.
- YSM may loan marketing materials, such as banners, to event organizers, for return post-event.
- Involvement of YSM staff / volunteers may be extended, at our discretion, based on availability, location and the nature of the event.
- General event planning advice and expertise.
- YSM may aid your event promotion via our social media platforms.
- When tax receipts are requested, YSM will issue official income tax receipts – in accordance with Canada Revenue Agency guidelines – for any gifts of \$20 or more for which complete donor information is provided electronically to YSM, within 30 days of the event.
- We will recognize your organization or group, as per YSM's Donor Recognition Policy.

How YSM will NOT offer support

- Expense coverage or reimbursement of any of your event expenses.
- Mail / email lists for promoting your event, or any other non-social media promotion.
- Guaranteed attendance of YSM staff or volunteers at your event.
- Applications for gaming or raffle license(s).
- Prizes, auction items or awards.



5 Steps to a successful event

1. Brainstorm!

Do you know who your audience is? Understanding who will support and attend your event is crucial to success. Start by writing down what you know about the qualities and demographics of those most likely to attend – important for promotion and ticket sales.

Once you know who your audience is, develop an event idea to excite that audience. Talk with family, friends or colleagues to generate ideas.

2. Plan

Make a budget and map out all the means related to your event through which to generate revenue. Remember: the lower your costs, the larger your charitable contribution!

Outline basic information such as your event concept, date, time and location of where your event will take place. Complete the Event Proposal Form outlining the basic information such as event concept, date, time and location of where your event will take place.

Key tip: Try getting gifts in kind from contacts or local businesses, eg. printing of needed materials, in exchange for event exposure for the donor - lower expenses increases your proceeds and lowers your financial risk.

3. Get online

YSM will help you create an event fundraising site and / or personalized page(s) using our online peer-to-peer fundraising platform called 'raisin'.

Note: Please allow two weeks after your Event Proposal Form has been approved for your online fundraising site to be created.

4. Logistics

In event planning, attention to detail is key. That's why YSM is happy to review the logistics of your event with you, as needed. See our **Event Checklist** for important details to consider.

Key tip: You don't need to plan alone . . . ask friends, family or even colleagues and neighbours for assistance – they may inspire ideas and offer skills and contacts outside of your own.

5. Promotion

Eye-catching flyers, tickets and other promotional materials will help create the awareness needed to make your event a success. In addition to print materials, be sure to take advantage of social media channels, as a means to widely spread the word about your event – for more information, see page 12 (Making the most of social media).

As you're supporting YSM, we'd be proud to feature our logo on event materials, as the recipient charity – please send us your material(s) for branding review and approval a minimum two (2) weeks prior to printing / distribution or use.



About tax receipting

Qualifying for a tax receipt

For those who donate \$20 or more, and for whom full donor information – name, complete mailing address including postal code, donation amount and payment type – is supplied to YSM electronically, we will issue a charitable tax receipt, according to Canada Revenue Agency (CRA) guidelines.

Note: Tax receipts will be issued directly to donors and no receipt(s) can be transferred to another party.

Gifts in kind

YSM will issue charitable tax receipts for items donated only if the item is new, valued at \$200 or more and is accompanied by a receipt of purchase or other proof of value. For items valued at \$1,000 or more, an appraisal by a recognized party and which proves the value of the item is required. *

If the item is donated by a business and is considered inventory, it is deemed a business expense and, in such a case, YSM will provide a letter of acknowledgment of the donation, rather than a charitable tax receipt.

Conditions: Cost of any required appraisals are to be covered by either the donor or receiving party / group; *YSM will not cover costs for valuations or appraisals. Additionally, YSM cannot issue tax receipts for donated goods or products for which there is not a clear and demonstrable value – examples of such circumstances would include sports paraphernalia, reward points for items without a fixed value (like airline travel points), etc.

Services

In accordance with CRA regulations, YSM cannot provide charitable tax receipts in exchange for donations of services, like volunteering, photography, emceeing, etc.

Event tickets

When a person purchases an event ticket, they are essentially purchasing an item with a discernable value – event admission could include a meal, a sports tournament, entertainment, etc. In that sense, purchasers are receiving *specific value of goods*, or a purchase rather than a charitable donation. In such instances, YSM is not authorized to issue a charitable tax receipt for the face value of the purchase / ticket amount.

As ticket prices can be set above the value of the actual cost of goods / services represented, as a means of raising funds. When that is the case, YSM – at its sole discretion – can issue charitable tax receipts for the portion of the ticket price which is above / in addition to the actual value of expenses after full event cost calculation. Such receipts will only be issued to donors post-event, after a budget reconciliation.

Artwork

YSM will only provide a charitable tax receipt for donated artwork(s) with a letter of valuation or an appraisal from a certified independent retailer able to verify the value or provide a receipt of purchase.

For individuals who make art for a hobby, only the value of the products used to make the art is eligible for a charitable tax receipt, with proof of purchase / value required.

Acting as event coordinator

When an event coordinator or fundraiser collects money from the general public and offers the proceeds to YSM, the coordinator is not entitled to receive a charitable tax receipt for the value of time spent organizing the event.

Only individual donors who contributed to the event or who bought a ticket will be entitled to receive any charitable tax receipts.

Note: Event guests who buy an actual item – like a raffle ticket or auction item – are not entitled to receive a charitable tax receipt, since they received goods and / or services for the amount paid, and which is not receiptable.



Seeking event sponsorship

Sponsorship can mitigate costs associated with staging an event, while also adding excitement and helping to alleviate spending restrictions. Important to remember, however, is a healthy sponsorship relationship should benefit both parties.

Companies choose to become sponsors in exchange for opportunities which set them apart from their competition and provide unique recognition and / or business networking opportunities through showcasing their products, for example.

Sponsorship identification & assessment

A preliminary part of your event plan should be identifying a list of potential sponsors, known as prospects, and exploring their connection to the cause being supported and their ability to offer support.

As event coordinator, you should create a prospect list including prospect name(s), targeted amount or product, and who will make the request for support.

Gift in kind (GIK)

Gifts in kind are equally important as cash commitments. They can help reduce expenses, and contribute to the event experience, with positive net effects on your bottom line.

As a common rule of thumb, for every potential supporter you approach, anticipate only up to 25% will typically offer their support. The more research you do to understand an appropriate sponsorship ask, the better the chance identified prospect(s) will respond favourably to your request.

How to cultivate a sponsor

Cultivating sponsorship prospects means building relationships with them which will inspire them to be more likely to give. Effectively you are educating the sponsor about the importance of the cause you're supporting and how your event audience will be made aware of – and come to value – their support.

- Initial contact should be by phone or email. Inquire about the sponsor's interest in learning more about your cause and event. If willing, arrange a face to face meeting. This can be a formal business meeting or simply coffee, but face-to-face meetings are the best means to cultivate and solicit support.
- Inspire prospects by describing your event and what impact it will have on those being supported. People give to people. Be sure to outline the sponsorship benefits for them, in terms of recognition, brand building, product sampling, etc and offer them a Sponsorship Package to reference after your meeting.

Sponsorship Package

Your sponsorship package should outline the event details, the impact, their opportunity to be involved and who else is already involved in the event. The package should also include:

- Interesting information about the cause being supported and its work.
- An overview of the event – include photos and statistics.
- A range of sponsorship levels, with meaningful recognition benefits associated with each.

Solicitation

While cultivating a sponsor, be prepared to ask for a specific amount. If the response is 'no', you should have a contingency plan by which you might turn the 'no' into a 'maybe' or 'yes!'

Follow up on the ask, and offer to answer any questions or talk through specific needs they may have are good ways to maintaining open communications and influence them to offer their support, either immediately or in the future. It's best to tell the prospect of when you will follow up with them and keep to that commitment.

Stewardship

Attention to deepening your relationship with a supporter begins pre-event and can include:

- Sharing all relevant event information with sponsor(s).
- Ensuring all applicable benefits are provided, according to sponsorship terms.
- Confirming sponsors attendance and that of their valued guests.
- Assigning a specific committee contact to sponsors, to ensure consistent communication and high-level attention and service.
- Thanking them meaningfully after the event, and sharing how much was raised with their support.

Post-Event Stewardship

A thank you note should be sent at least 48 hours after the event. After thanking sponsors, it is good practice to provide them with an event report highlighting successful aspects of the event and should include:

- How much money was raised
- Key event statistics, like how many people were exposed to their products / recognition
- Photos of the event
- The impact of the funds raised



Making the most of social media

Know your audience and channels

Once you have identified your target audience, research which social media channel(s) they are most likely to use. Depending on your results, and as needed, create related social media accounts, i.e. Twitter and Instagram account(s); a Facebook event page. Concentrate efforts on specific channel(s) which provide the best reach to your target audience.

NOTE: It's recommended you limit Facebook and Instagram posts to 2-3 times a week, at most, whereas you can tweet via Twitter daily. In the event lead up, and on event day, you can increase the volume of your posts or tweets.

Hashtag use

Think of hashtags (#) as an index — they help people find information related to a particular topic of interest. Consider giving your event a unique *#hashtag* that people can use leading up to, during and post-event.

Focus on popular hashtags – Instagram and Twitter will recommend these to you – as they will broaden your reach by connecting you to those already making use of them. An example commonly used by YSM is *#TransformTorontoTogether*.

Involve influential ambassadors

You may know of people and organizations aligned to your cause who have already built a successful online following. Ask them to act as social media ambassadors or advocates by sharing your social media posts and spreading word of your event via their channels. As an example, if your event is a run or walk, you could approach The Running Room or Runner's Choice about supporting or endorsing your event through their channels.

Have an enticing offer

If possible, create a contest offering a reward to people who follow, like or share content on your event's social media channels. Doing so can create momentum and attract people you would not have otherwise reached. If you have a ticket draw, [here](#) is an online tool to help you choose a random winner!

Use images and video

Statistics show a post including an image or video can cause clicks to skyrocket. Use your own quality images rather than stock photography – the more authentic, the more people will relate to and value your cause.

Also, when you include imagery, keep text length short. Ideal length for Twitter is 70-100 characters, and 40-80 characters for Facebook.

Engage Often

Social media channels create an opportunity for you to engage in a two-way conversation with supporters – on Twitter, follow, re-tweet, like and mention your supporters; on Facebook, like, comment and share your followers' posts; tag friends and partners, and leave comments on Instagram.

Do Countdown Reminders

A consistent roll-out will keep your event top-of-mind. Start with a teaser to peak curiosity and provide more context later. As the event nears, remind people of the number of days left. Save news of an exciting event detail for one to two weeks before your event – depending on its appeal, it may influence people to attend your event.

Repeat Content

Last minute participants or supporters may not have viewed your messages from weeks earlier. Its okay to repeat the same message (changing the content slightly!) to get their attention.

Consider: Statistics show Facebook posts have a life span of approximately 14 hours, Instagram 21 hours and a tweet just over 4 hours.

Plan it out

It's important to plan out your content. Some information may change, but it is good to have a strategy on frequency and messaging from the outset.





Email marketing tips

The “You’ve got mail!” days are not behind us. In fact, statistics show email continues to be one of the most successful tactics for driving sales. To help you use it to your advantage, here are some email marketing tips to get higher open rates and more engagement with your email contacts.

Subject lines are important

33% of recipients open emails based on the subject line alone!

Luckily, there are tried practices you can adopt in your next email, including keeping the subject short and sweet – i.e. no more than 10 words; address emails to a person’s name and briefly describe what’s inside. Do not write your subject line like you would an advertisement!

Email structure

The average adult span of attention for email is eight seconds. This means your content will not be read word-for-word. The best approach is to structure emails using the “Inverted Pyramid Method.” A large photo at the top, headline underneath, brief body that follows, then end with a call-to-action and contact information.

Segment your list

By personalizing content within an email, you are improving the reader’s experience and enjoyment. Segments to use can include: people who support the cause, have previously attended, have never attended, etc.

As an example, “<Name>, we know you <haven’t been> to an event like this before, however, we thought we’d extend an invitation for you and your friends to join us because we understand how important <ending poverty> means to you.”

Cost effective email marketing platforms, like MailChimp and ConstantContact, are widely accessible.

Getting started

Important is to use email to cost effectively promote your event, here's how:

1. Establish an email schedule, outlining what you aim to accomplish in each email.
2. Build your email list by gathering emails from your contacts. If needed, conduct an incentivized promo that collects email addresses from contacts / the public; also consider adding a button to your website or social media through which people can subscribe to your email list.
3. Decide a look and feel. Be consistent. Email marketing platforms will help with this.
4. Create your content, upload your list(s) and send!
5. Repeat, as per your plan.

Effective media releases

What makes a news story?

Timeliness, a large number of people affected, prominence, emotion, proximity, oddity, conflict, suspense, trendiness and rarity.

Effective Media Releases

There are different types of releases to use, depending on your goal:

Community Calendars — “What’s Happening” section of a website; includes basic information; not longer than 50 words.

Public Service Announcements (PSAs) — Invites the public to attend; sent out four to six weeks before an event; alerts the news desk of a possible event.

Media Advisories (MAs) — Invites the media to attend; specific time, date and directions given two to three days prior to an event; doesn’t give away too much of the story.

News Releases (NRs) — Tells the media the story via quotes; sent the day of or up to one day after, to media directly.

Sending out releases

Addressed to Main News Desk or Assignment Desks and, if there is a person who specifically handles PSAs or Community Calendars, includes them.

Think outside the box — can your story go to different sections? Would a radio talk show or TV show be interested? Listen or watch a few programs to know whether your event is a good fit.

Remember not to email large files or files containing animation or GIFs, as most firewalls will reject your submissions. If you need further contacts, look at the media outlet’s website — specifically for a reporter or editor list. Otherwise, you can call and ask for this information if not found online.





Silent auction musts

Coordinating a silent auction can be challenging but, if done right, it can also be very lucrative. Before gathering items to offer in your silent auction, ask yourself a few key questions:

1. Will I have enough guests attending to make money from a silent auction?
2. Do I have the resources to promote, gather and package items?
3. Can I attract a variety of goods, at different price points to make an appealing auction?

If you said yes to the above, you're ready to put together a silent auction! Following are some suggested next steps . . .

Soliciting Items

- Determine what items will most appeal to your targeted event attendees.
- Create a list of items you would like to secure for your auction; determine who you know who could be approached to donate.
- Create a donation request letter; customize the letter for each prospect and ensure your letter includes your contact information and a date by which you'll follow-up.
- Once donations have been confirmed, keep a master list of all items, with a description of donated item(s), value, who donated the item(s) and the donors' complete contact information for a post-event thank you.
- All items should be received at least two weeks prior to your event to allow enough time to package them and to promote highly desirable items.
- Lesser-valued goods should be bundled into packages. Doing so will bring just as much money in, if not more, and create less crowding on the silent auction table.

Popular auction items

Following are some top auction items, which are sure to attract numerous bids:

- Once-in-a-lifetime experiences — Exotic trips, hot air balloon rides, meet-and-greets with well-known people, or back-stage visits.
- Unique culinary packages — A seat in the chef's kitchen, cooking classes, an in-house chef, dinner hosted in an executive's house, wine tours, etc.
- Electronics / technology — Large HD TVs, tablets, phones, computers, and gaming systems.
- Baskets — Get creative with these - gather items with a lower value and combine them to fit within a theme that relates to any of the above.
- Trips — Anything from gathering friends for a group trip abroad, to hotel stays, to mini getaways.

Set Up

Bid Sheets

- Include the item name and description, opening bid value - generally 30-50% of the retail value - and indicate pre-determined bid increments.
- Print blank copies of bid sheets, in case any sheets get filled up.
- Include separate columns for bidders' name, phone number and bid amount.
- Have all your bid sheets printed prior to setting up the event.
- Placement:
 - Try to alternate between an eye-catching item and a certificate to ensure no tables are overlooked. Keep the real certificates and place a Word.doc version on the table.
 - Have correlating numbered stickers on both the bid sheet and the item. This will help match up the winners with the proper items at the end of the auction.
 - Collect the bid sheets after the auction closes and organize them in numerical order where you will be cashing out the winners.

Closing the Auction

- Set a closing time and display it on tables, event programs, etc.
- Don't forget to make multiple announcements to give attendees notice before the auction closes.
- Assign someone to circle the winning bid on all bid sheets when the auction closes.
- Assign someone to take photos (proof) of the winning bid sheets after the winning bid has been circled. There are a lot of moving parts in an auction, and the less margin for error, the better.

- Ask bidders to return to the items they bid on to see if they won.
- Winning bidder will need to bring the bid sheet to the auction close-out table.
- YSM will provide a point of sale (POS) machine, when available, to use in clearing credit card (Visa, MasterCard and AmEx) and debit auction payments.
- Have two or three individuals collect the items individuals have purchased; have numbers on the items, so individuals will be able to quickly collect them.
- Write the item number(s) on the POS sheet and write “paid” on the bid sheet.

TIP: Ensure there is enough time when the auction closes and cash-out begins to allow your cashiers to get organized. We suggest 20 minutes minimum.



Post-event considerations

Post-event to dos

Once the event is over, start wrapping up loose ends including paying outstanding invoices, collating information on your donors and submitting your event proceeds to Yonge Street Mission. Other to dos could include:

- Thank your committee volunteers
- Pay any outstanding invoices
- Collect remaining payments
- Complete your final budget
- Submit proceeds to YSM, within 60 days of your event
- Tax receipts — if desired / applicable – you will need to provide all related donor information electronically to YSM, along with your event's net proceeds
- Hold a wrap-up meeting with your committee to evaluate what went well and what could be changed
- Thank and acknowledge those who participated in or supported your event
- Offer personal thank yous to your volunteers
- Thank sponsors separately and meaningfully
- If you had an auction, remember to thank auction donors
 - Don't forget to let those who supported your event know how much your event raised, and the impact those funds will have

... Start planning for next year!

Additional resources

About YSM

Click [here](#) to learn about our mission, vision and values.

Important to remember

Third party events or promotions must be consistent with Yonge Street Mission (YSM)'s Mission, Vision and Values; adhere to our Community Event Policies; maintain a positive image for our organization and cause; and have profitability and / or public relations value.

If organizers wish to use YSM's brand to solicit support for their activity, the organizer(s) need to seek and receive YSM approval. The process includes completing an [Event Proposal Form](#).

YSM event policies and procedures

- Community fundraising event parameters are reviewed for kind, type, activity, profit potential and YSM involvement prior to approval.
- Event activity(ies) should generate a positive event image and raise awareness of YSM.
- YSM will NOT incur costs on behalf of community event(s) or organizer(s).
- Funds flowing to YSM through online registration or POS transactions will be considered part of your event's net donation – these funds cannot be transferred from YSM to event organizers to cover expenses.
- Ensure event associated expenses are covered through event revenue, excluding online registration and POS transactions.
- YSM's logo cannot be used without our permission: YSM must provide final approval of all event materials containing YSM's logo or mention of YSM / YSM programs as being a beneficiary **prior to any printing and/or distribution.**
- Community events requiring licenses and fees must conform with all applicable government regulations.
- All money, records and requests for donation receipts must be sent to YSM no later than 60 days post-event.

- All donations will be accepted and processed in accordance with YSM gift acceptance policies and administrative procedures, and charitable donation receipts will be issued in accordance with Canada Revenue Agency regulations.
- Where community event organizers wish to designate proceeds to a particular YSM project, program or service, YSM will ensure funds are dispersed as per the organizer's designation, so long as the designated purpose is a YSM funding priority.
- YSM is not in any way liable or responsible for any injury which may occur as a result of an event; a waiver to that effect must be signed by all event participants and volunteers.

Event organizing checklist

- Identify your event concept or theme
- Recruit a committee to help plan the event
- Identify an appropriate and affordable venue for your event, if needed
- Select the date of your event and book the venue (as applicable)
- Outline details of your event and submit an Event Proposal Form to YSM
- Create your event budget; keep updating it as costs become known
- Develop a critical path of key elements and deadlines to successfully organize your event
- Identify and solicit potential sponsors
- Create an online event site / personalized page via YSM's raisin software, to help you in easily soliciting contacts for their support
- Create and distribute marketing materials - save the date, invitations, posters
- Secure speaker(s) / entertainment
- Post event info online
- Promote your event
- Confirm menu/décor
- Solicit contacts and nearby businesses for auction items, as applicable
- Recruit volunteers
- Secure audio/visual equipment and materials
- Outreach to aligned media through applicable means, i.e. PSA, press release, advisory
- Delegate tasks to committee/volunteers
- Create "day of" run sheet for your event
- Confirm roles / timing for committee/volunteers
- Set up for your event
- Thank your participants, donors, sponsors and volunteers
- Celebrate the success of your event
- Hold a post-event committee meeting to evaluate successes/challenges and make recommendations for following year
- Pay all event expenses
- Provide YSM with net event revenue within 30-60 days of event
- Electronically provide YSM with all donor data for tax receipting, within 30-60 days of event
- Share event success and thank participants, donors and sponsors